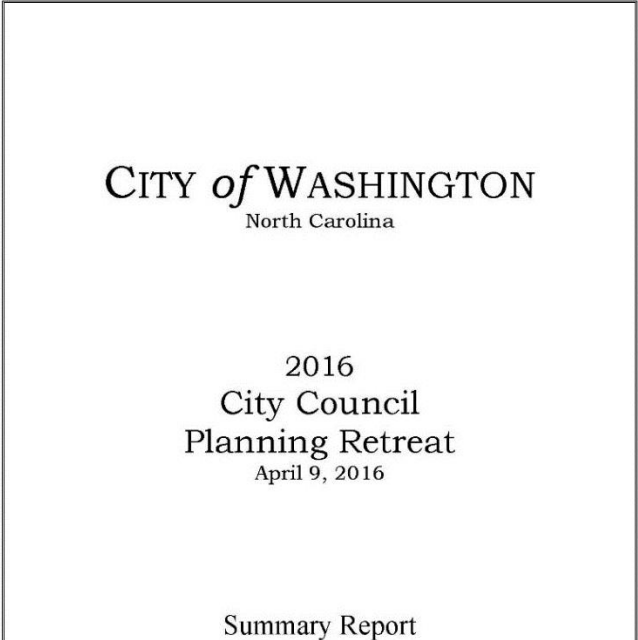


The Washington City Council met for a retreat on Saturday, April 9, 2016 at 8:30am in the conference room at Washington-Warren Airport. Present were: Mac Hodges, Mayor; Virginia Finnerty, Mayor Pro tem; Doug Mercer, Councilmember; Richard Brooks, Councilmember; Larry Beeman; Councilmember and William Pitt, Councilmember. Also present: Bobby Roberson, City Manager and Cynthia S. Bennett, City Clerk.

Mayor Hodges called the meeting to order and David Long, retreat facilitator conducted the remainder of the meeting.



DAVID LONG CONSULTING
Strategic Planning & Organizational Development
for North Carolina's Local Governments

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April 14, 2016

Mac Hodges, Mayor
Bobby Roberson, Manager
City of Washington
102 East Second Street
Washington, NC 27889

Dear Mayor Hodges and Mr. Roberson:

I was honored to be asked to work with the City Council for its 2016 Planning Retreat and appreciate very much the opportunity to serve. It has been a genuine pleasure working with everyone involved. The Council made much progress in expressing its ideas, shaping a sense of strategic direction and arriving at a common understanding of its long-range priorities. My impression is that the session was very positive and that the discussion was both energetic and constructive.

Please extend my gratitude to the members of both the Council and staff for their cooperation, assistance, enthusiasm and skills in making sure that everything operated smoothly—it is sincerely appreciated.

I hope that everyone will find the attached report to be accurate and satisfactory in all respects. If there are any deficiencies or needs for revision, please let me know as soon as possible so these can be addressed.

Thanks very much! I have enjoyed working with the City of Washington. If called upon, I would look forward to continuing our work together in any way possible.

Sincerely,

David Long MPA
Consultant/Facilitator

City of Washington
2016
City Council
Planning Retreat
April 9, 2016

Summary Report
April 14, 2016

1.0- INTRODUCTION

The City Council of the City of Washington conducted its 2016 Planning Retreat on April 9, 2016 at the Washington-Warren Airport. The retreat focused on the Council with the support of the manager and key staff. Attending and participating from the Council were Mayor Mac Hodges and Councilmembers Larry Beeman¹, Richard Brooks, Virginia Finnerty, Doug Mercer, and William Pitt².

David Long, a planning consultant based in Greensboro with 42 years’ experience serving local governments throughout North Carolina, served as facilitator and prepared this summary report. The consultant’s bio is included as [Attachment 1](#).

The summary report includes brief narratives describing selected elements of the retreat agenda and activities. (Additional elements may be included later as they become available from key staff.)

The consultant conferred with the City Manager in advance of the retreat to plan the session and to develop the agenda. The retreat agenda is included as [Attachment 2](#). This summary roughly parallels the sequence of retreat agenda items.

2.0 - STRUCTURED BRAINSTORMING

The Council engaged in a structured brainstorming process led by facilitator David Long. The purpose of the process was to assist the Council in developing a consensus-based prioritization of goals for the long-term.

The focus question for the session was:

¹ Departed retreat following brainstorming session
² Joined retreat mid-afternoon

What are the most important issues, needs and opportunities facing the City of Washington over the next 3-5+ years?

The process allows for maximum individual creativity and respects the individual’s right to voice opinions in an unpressured manner, while gradually building consensus and arriving at common ground among the group, specifically a set of priorities that is ‘owned’ in a unified manner by the Council. The structured process is a proven and tested method that consistently delivers results and very positive reviews from participants.

Many key pieces of information were generated from the session—a series of Excel spreadsheets were developed summarizing this information and are embodied in [Attachments 3.1 through 3.3](#).

The facilitator interacted one-on-one with each participant until all ideas had been expressed and recorded on flip chart sheets. The participants voiced a total of 34 responses. Participants then prioritized these 34 items individually using a system in which a) their top nine priorities were selected and b) these top nine were further refined by assigning nine points to the highest item, eight to the next highest and so forth until the ninth item then received one point.

- [Attachment 3.1](#) lists the 34 items in the order originally generated.
- [Attachment 3.2](#) lists the 34 items sorted by the Council’s priorities—in descending order by points received. The top items follow (*points in red and item numbers in black*):

24

4

Police station

18

2

Decide where we want to be 20 years from now; and how to get there

16

12

Drainage throughout town

13

7

Improve and enhance downtown area; clean up and keep it clean; improve appearance

12

13

Move forward with pool; make (funding) secure

11

26

Address aging infrastructure citywide but especially downtown

10

9

Infrastructure of City buildings; upkeep; remove if necessary

10

32

City Council set a positive tone so it carries over to employees

The themes were developed by the facilitator and items assigned to each theme several days following the session. The themes are intended simply as a method to better grasp

the results, and in no way to supersede or challenge any other decision-making processes in place.

It is a conceptual tool, not an end product—unscientific and imperfect but hopefully a helpful piece of information in charting a course forward. It is also somewhat subjective on the part of the facilitator, although the general intent was to follow as closely as possible the themes identified by the Council during the retreat. Others might observe completely different themes and/or assignment of items to themes (due to overlap, gray areas, etc.) and are encouraged to do so. The themes can best be thought of as a tool for achieving a division of labor, for example, if multi-disciplinary task forces were to be established, each might address a priority theme.

The themes and aggregate points (in red) of each follow (total points=225):

• Tourism/Downtown/Retirement/Bedroom Comm.	50
• Leadership/Relationships/Vision	46
• Infrastructure	45
• Parks and Recreation	30
• Facilities/Equipment	24
• Growth Management	13
• Finances/Efficiency	9
• Jobs/Economic Development	8

There is nothing binding about the themes and the points attributed to each. The most important fact is that each idea was voiced, and is therefore important regardless of the points received. At best, the rankings provide a rough idea of the relative weight of each theme. Much more insightful analysis by those closest to the issues (Council, staff, residents, etc.) is required to convert these rankings into a meaningful basis for action.

3.0 - IDENTIFICATION AND PRIORITIZATION OF BROAD STRATEGIC LONG-RANGE THEMES BY COUNCIL

The facilitator developed the themes identified in the previous section in the days following the retreat. At the retreat, the Council confirmed by consensus the following as broad priorities. The prioritization process was very informal and not rigidly hierarchical:

MAJOR PRIORITIES IN ORDER VOICED BY COUNCIL AT RETREAT

1. Tourism/downtown/retirement/bedroom community
2. Jobs/economic development
3. Infrastructure
4. Parks and recreation
5. Relationships
6. Growth management
7. Finance

4.0 – GENERAL STRATEGIC PLAN

A goal of the retreat was to arrive at an organized course of action. For each of the broad themes, the Council identified and affirmed by consensus the following general strategic plan. The following is intended not as an end-product, but simply as a first attempt to document and recapture the core ideas of the Council at the retreat. It should be considered preliminary, and subject to refinement as the ideas become clearer and come into greater focus. (Blank bullets are intended as a ‘prompt’ that other strategies might be added later.)

Tourism/downtown/retirement/bedroom community

- Develop plan and buy-in
 - Marketing
 - Differentiation
 - Retail strategy-more hours
- Weddings/special events
- Water and people
- River experience
- Nightlife/restaurants
- _____

Jobs/economic development

- Vocational training for jobs going unfilled via community college, etc.
- Mismatch between what industry wants and what education system is producing
- Publicize openings
- 10K city residents paying for 30K population benefitting
- Regulatory environment very stringent; i.e. health regulations for restaurants
- _____

Infrastructure

- Drainage – review of systems and prioritization; be committed to following-through; move beyond ‘squeaky-wheel syndrome’; systematic approach/comprehensive plan
- Street paving – ditto above
- Aging water-sewer lines, especially downtown – ditto above
- Need CIP/capital budget
- _____

Parks and recreation

- Do we repair pool?
 - Costly
- Soccer field
- Funding strategy
 - Sustainable
 - Optimize funding
- Handicapped parking/accessibility
- Off-street parking at baseball and soccer facilities
- Outreach to overlooked/disadvantaged populations to encourage participation
- _____

Relationships

- Quarterly meeting with County Commissioners
- Civil courteous interaction among Council; agree to disagree
- Prioritize
- Work with Community College and County Schools to match training needs of business and industry; meet annually; conduct tours
- _____

Growth management

- Issue of those outside City benefitting but not paying
- Voluntary annexation via desirable services; make it economically desirable to be in City
- _____

Finance

- Balance tax rate with service delivery; be fiscally responsible
- Unfunded mandates
- _____

5.0 – POTENTIAL NEXT STEPS

Strategic Planning

The work generated at the retreat could easily form the foundation for a strategic planning initiative by building on the momentum generated at the retreat and continuing to move forward in an energetic manner. For example, it would be a relatively simple step to convert the results of the retreat into a hierarchy of goals, strategies and actions.

Action Planning

Action planning involves a detailed breakdown of the broader goals and strategies into action steps—or the ‘nuts and bolts’ of implementation for top priorities. This process is designed to ensure that ideas move beyond just words, and are instead converted into accountable action.

Formal action planning would conform roughly to the following template:

Action Plan #1

Goal –

Strategy –

Action –

Resources Needed –

Who is Involved –

Who Takes the Lead –

Potential Obstacles –

Potential Allies –

Target Date –

Report Back from Lead –

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DAVID LONG has served as a professional planner and facilitator, primarily within the State of North Carolina, since 1974. He has led numerous retreats and goal-setting sessions, and has assisted clients in developing a broad range of plans. Clients include elected officials, planning boards, boards of education, chambers of commerce, economic development agencies, tourism organizations, special task forces, grassroots organizations, non-profit organizations and regional partnerships.

From 1974-2004, David served with the NC Department of Commerce as a liaison between state and local governments based in Winston-Salem, Asheville, Wilmington and Fayetteville. From 1986-2004 he served as the chief planner in a twenty county area of the Piedmont region of North Carolina, based in Winston-Salem, with responsibility for delivering planning services to over 150 communities in the fields of community planning, public management, and economic development.



He is deeply understanding of the unique roles of elected officials, managers, and non-profit leaders and is exceptionally skilled in working with these valued leaders to advance steadily on solid ground.

In 2004, David initiated a private consulting practice and continues to serve public, non-profit and private organizations. Responding to the competitive realities of the global economy, he has committed much of his energy to assisting communities in adapting to challenging economic times. He especially enjoys helping communities find common ground and reach their full potential by gaining traction and achieving a shared sense of purpose, vision and overall direction.

David has assisted over 425 organizations in conducting retreats/input sessions and in crafting creative plans and policies. He served on the adjunct

faculty of the University of North Carolina at Greensboro, where he taught a popular course in strategic planning. David is a recipient of the Order of the Long Leaf Pine, awarded by the Governor for lifetime service to the State of North Carolina.

David's recent work has focused on consensus building, strategic planning, growth management, economic development, and public policy. Along with colleagues Carol Rhea and Jeff Michael, he organized and led a groundbreaking regional planning initiative, the Yadkin/Pee Dee Lakes Project, built on principles of grassroots public participation; has assisted in establishing many local and regional tourism organizations; and has advised the Blue Ridge National Heritage Area.

David was instrumental in the late 1970s and early 1980s in laying some of the foundations for the highly successful revitalization of the City of Asheville as well as the resurgence of the broader mountain region. He also assisted many communities in the coastal region in implementing the initial phases of the Coastal Area Management Act.

David holds a BA from the University of North Carolina at Chapel Hill, a Master of Public Affairs (MPA) from Western Carolina University, a certificate in nonprofit management from Duke University, and was a longtime member of the American Institute of Certified Planners.

David is a tenth generation North Carolinian with deep roots in the State, and operates as a fully independent practitioner. He and his wife Ann, a retired teacher, reside in Greensboro. Twin daughters Sarah and Elizabeth (age 30) are his heroes and constant inspiration for creating communities that value the unique talents and perspectives of each and every citizen.

Please see client list next page.

Examples of Clients Served: Retreats, Strategic Plans, Goal-Setting

Advantage West	Montgomery County EDC
Apex, Town of	Moore County Planning Department
Archdale-Trinity Chamber of Commerce	Morrisville, Town of
Asheboro-Randolph Chamber of Commerce	Mount Airy, City of
Bethania, Town of	Mount Airy Chamber of Commerce
Black Mountain, Town of	Newton, City of
Blue Ridge Parkway Foundation	North Carolina Arts Council
Blue Ridge National Heritage Area	North Carolina Department of Commerce
Camden County	North Carolina Department of Cultural Resources
Carthage, Town of	North Wilkesboro, Town of
Central Carolina Education Consortium	Northwest Piedmont Council of Governments
Chapel Hill Downtown Partnership	Piedmont Land Conservancy
Chapel Hill, Town of	Piedmont Triad Partnership
Chatham County	Pittsboro, Town of
Chinqua-Penn	Randolph County
Clemmons, Village of	Reidsville, City of
Dan River Basin Association	Rockingham County
Danbury, Town of	Rockingham County Chamber(s) of Commerce
Davidson County	Rockingham County EDC
Davidson County Schools	Rockingham County United Way
Davie Chamber of Commerce	Spencer, Town of
Davie County	Stanly County Chamber of Commerce
Deerfield Beach FL, City of	Stokes County EDC
Downtown Mocksville	Stokesdale, Town of
Downtown Salisbury	Surry Arts Council
Garner, Town of	Surry County
Graham County	Surry County Board(s) of Education
Greenville, City of	Wadesboro, Town of
Historic Salisbury	Waynesville, Town of
Kannapolis, City of	Wilkes County Chamber of Commerce
Kernersville, Town of	Yadkin/Pee Dee Lakes Project
Lewisville, Town of	Yadkin County Schools
Lexington, City of	Yadkin County
Lexington Tourism Authority	Yanceyville, Town of
Marshville, Town of	
Mebane, Town of	

WASHINGTON CITY COUNCIL
PLANNING RETREAT
April 9, 2016

<i>Time</i>	<i>Topic</i>	<i>Presenter/Leader</i>
8:30-8:45	Welcome and introduction to today's session	Mayor Hodges Bobby Roberson, Mgr.
8:45-9:00	Overview of retreat & format	David Long, Facilitator
9:00-9:30	<i>State of the City Report</i> Manager's perspective on City's future Q and A: Council and Manager	Bobby
9:30-10:00	Facilitator's general discussion with Council	David
10:00-11:30*	Structured group brainstorming with Council Focus Question: 'What are the most important issues, needs and opportunities facing the City of Washington over the next 3-5 years?' ¹ *Break around 10:45 for 15 minutes	David
11:30-12:00	Discussion of brainstorming results and identification of high-priority strategic directions ²	David
12:00-12:45	Lunch <ul style="list-style-type: none">Continuation and closure of previous discussion as lunch is winding downComments by mayor and manager as appropriate	
12:45-2:30	Develop draft strategic plan ³	David
2:30-2:45	Break	
2:45-4:15	Action planning for very high priority strategies ⁴	David
4:15-4:30	Wrap-Up/Adjournment	Mayor Hodges Bobby/David

¹ End product: a prioritized list of specific ideas generated by the Council with numerical values
² End product: a hierarchical set of about 5-7 broad strategic directions (e.g. quality growth, economic development, etc.) with a bulleted list of specific priorities under each
³ End product: continuation and refinement of #2
⁴ End product: detailed implementation plans for a handful of specific items deemed to be very high priority, listing the 'who, what, how, when, resources needed, allies, obstacles, etc.'

Att. 4.1

Washington City Council: Retreat Brainstorming 4.9.16	
What are the most important issues/needs/opportunities facing the City of Washington over the next 3-5+ years ?	
Item #	Listed by Item #
1	Define a vision for the City; tourism destination; in order to keep City as it is but better; to enhance City
2	Decide where we want to be 20 years from now, and how to get there
3	Jobs
4	Police station
5	Parks and recreation; plan for BB Park; participation; Havens Garden
6	Once vision is set, energize citizens for buy-in
7	Improve and enhance downtown area; clean up and keep it clean; improve appearance
8	Keep City moving forward with adequate funding
9	Infrastructure of City buildings; upkeep; remove if necessary
10	Streetscape and wayfinding implementation
11	Define what would make us a great destination and implement
12	Drainage throughout town
13	Move forward with pool; make (funding) secure
14	As we grow, have a vision for new roads, streets, etc.; 15th Street bypass
15	Improve relationship with County Commissioners
16	Schedule annual retreats to keep on-track
17	Look at maximizing services at best possible cost; consider, e.g. outsourcing
18	Encourage City board members to be present and participate; not be absent
19	Affordability to live in City and still maintain fees, finances, etc.
20	Keep City finances in best shape they can be in
21	Promote growth via voluntary annexation by offering superior services
22	For City to be known as a top employer; a desired place to work
23	Build on our parks and recreation by expanding into soccer complex
24	Grocery store—Bridge St. and 3rd St.—downtown
25	Continue to seek an investor to build a hotel downtown
26	Address aging infrastructure citywide but especially downtown
27	Expand vision for growth citywide to include some overlooked areas
28	Facilitate fuel on the waterfront (for boats)
29	Continue to promote growth at the airport via facilities, etc.
30	Safer exhaust emissions on garbage trucks; safety hazard
31	Add an interactive water feature to children's park on waterfront
32	City Council set a positive tone so it carries over to employees
33	Improve appearance of backs of downtown buildings used for murals, etc.
34	Move Senior Center to Susiegray McConnell Complex and/or find way for more parking at current center

Att. 4.2

Washington City Council: Retreat Brainstorming 4.9.16					
		<i>What are the most important issues/needs/opportunities facing the City of Washington over the next 3-5+ years ?</i>			
Total Points	Item #	Item <i>Listed by Points in Descending Order</i>			Individual points
24	4	Police station	3	9	7 5
18	2	Decide where we want to be 20 years from now; and how to get there	9	8	1
16	12	Drainage throughout town	7	4	5
13	7	Improve and enhance downtown area; clean up and keep it clean; improve appearance	8	5	
12	13	Move forward with pool; make (funding) secure	3	9	
11	26	Address aging infrastructure citywide but especially downtown	5	6	
10	9	Infrastructure of City buildings; upkeep; remove if necessary	6	4	
10	32	City Council set a positive tone so it carries over to employees	3	7	
9	1	Define a vision for the City; tourism destination; in order to keep City as it is but better; to enhance City	9		
9	10	Streetscape and wayfinding implementation	9		
8	3	Jobs	8		
8	5	Parks and recreation; plan for BB Park; participation; Havens Garden	8		
8	6	Once vision is set, energize citizens for buy-in	8		
8	14	As we grow, have a vision for new roads, streets, etc.; 15th Street bypass	7	1	
8	25	Continue to seek an investor to build a hotel downtown	6	2	
7	11	Define what would make us a great destination and implement	7		
7	34	Move Senior Center to Susiegray McConnell Complex and/or find way for more parking at current center	2	2	3
6	27	Expand vision for growth citywide to include some overlooked areas	6		
6	29	Continue to promote growth at the airport via facilities, etc.	6		
5	16	Schedule annual retreats to keep on-track	5		
5	20	Keep City finances in best shape they can be in	1	4	
4	17	Look at maximizing services at best possible cost; consider, e.g. outsourcing	4		
4	33	Improve appearance of backs of downtown buildings used for murals, etc.	4		
3	15	Improve relationship with County Commissioners	2	1	
3	31	Add an interactive water feature to children's park on waterfront	3		
2	18	Encourage City board members to be present and participate; not be absent	2		
1	21	Promote growth via voluntary annexation by offering superior services	1		
0	8	Keep City moving forward with adequate funding			
0	19	Affordability to live in City and still maintain fees, finances, etc.			
0	22	For City to be known as a top employer; a desired place to work			
0	23	Build on our parks and recreation by expanding into soccer complex			
0	24	Grocery store—Bridge St. and 3rd St.—downtown			
0	28	Facilitate fuel on the waterfront (for boats)			
0	30	Safer exhaust emissions on garbage trucks; safety hazard			

		Washington City Council: Retreat Brainstorming 4.9.16
		What are the most important issues/needs/opportunities facing the City of Washington over the next 3-5+ years ?
Total	Item	Item
Points	#	Listed by Themes and Aggregate Points (in Red) in Descending Order
		Tourism/Downtown/Retirement/Bedroom Comm.
13	7	Improve and enhance downtown area; clean up and keep it clean; improve appearance
9	1	Define a vision for the City; tourism destination; in order to keep City as it is but better; to enhance City
9	10	Streetscape and wayfinding implementation
8	25	Continue to seek an investor to build a hotel downtown
7	11	Define what would make us a great destination and implement
4	33	Improve appearance of backs of downtown buildings used for murals, etc.
0	24	Grocery store—Bridge St. and 3rd St.—downtown
0	28	Facilitate fuel on the waterfront (for boats)
50		
		Leadership/Relationships/Vision
18	2	Decide where we want to be 20 years from now; and how to get there
10	32	City Council set a positive tone so it carries over to employees
8	6	Once vision is set, energize citizens for buy-in
5	16	Schedule annual retreats to keep on-track
3	15	Improve relationship with County Commissioners
2	18	Encourage City board members to be present and participate; not be absent
46		
		Infrastructure
16	12	Drainage throughout town
11	26	Address aging infrastructure citywide but especially downtown
9	9	Infrastructure of City buildings; upkeep; remove if necessary
8	14	As we grow, have a vision for new roads, streets, etc.; 15th Street bypass
45		
		Parks and Recreation
12	13	Move forward with pool; make (funding) secure
8	5	Parks and recreation; plan for BB Park; participation; Havens Garden
7	34	Move Senior Center to Susiegray McConnell Complex and/or find way for more parking at current center
3	31	Add an interactive water feature to children's park on waterfront
0	23	Build on our parks and recreation by expanding into soccer complex
30		
		Facilities/Equipment
24	4	Police station
0	30	Safer exhaust emissions on garbage trucks; safety hazard
24		
		Growth Management
6	27	Expand vision for growth citywide to include some overlooked areas
6	29	Continue to promote growth at the airport via facilities, etc.
1	21	Promote growth via voluntary annexation by offering superior services
13		

	Finances/Efficiency
5	20 Keep City finances in best shape they can be in
4	17 Look at maximizing services at best possible cost; consider, e.g. outsourcing
0	8 Keep City moving forward with adequate funding
0	19 Affordability to live in City and still maintain fees, finances, etc.
9	
	Jobs/Economic Development
8	3 Jobs
0	22 For City to be known as a top employer; a desired place to work
8	
225	

ADJOURN

The meeting was adjourned until 5:30pm on April 11, 2016 in the Council Chambers.

Cynthia S. Bennett, MMC
City Clerk